

Acquisitions: So What and Where?

Perspective 1

by Carol Pitts Diedrichs

Where the future of the acquisitions function is going is a mystery to me. I would also propose that anyone who claims to know is really just a person who is willing to guess. It is impossible to foresee at this point exactly how the future for all of libraries will look. Who could have predicted where we are today? Look back over just the past 20 years and see the changes that have occurred in most of our careers—the impact of OCLC on technical processing, the importance of online integrated library systems on the way we do business, the evolving role of the Internet in the identification and "acquisition" of library material, the explosion of interest in outsourcing for all kinds of technical services activities. Who could have predicted most of these things? However, I am intrigued by three questions:

- What does the transition mean for acquisitions librarians and for academic library administrators?
- How can acquisitions librarians make the transition?
- How can administrators use acquisitions librarians' skills in the future?

A Message to Academic Administrators

The process of acquiring material is universal whether we are acquiring a physical piece, a virtual piece, or a disposable piece that will be taken away by the patron and never added to a permanent collection (or for that matter, may never exist under our control). The skills required to acquire the piece or access to it are the same skills: determining exactly what is required through our interactions with users or collection managers; finding the actual item and arranging for its purchase or delivery; monitoring compliance with contracts, licenses, and other agreements; and providing good stewardship of institutional funds and maintaining the audit requirements of the organization for the expenditure of those funds.

This marriage of library skills, management skills, and business skills will have a plethora of uses in the library of the future. More and more areas within the library arena are controlled by contracts. These contracts are governed by institutional strictures such as the bidding and negotiation process. Administrators will need articulate, savvy librarians who can work with institutional officers to outline the requirements and needs of the library. These individuals will need both business skills and library skills to navigate successfully the bureaucracies of all players:

the institution, the library, and the contractor. Acquisitions librarians are already familiar with the need to express library goals in ways which are meaningful to administrators working in the fields of purchasing and accounting. What combination of discount, service, and quality control is needed in each contract to provide the optimum arrangement for the organization? Acquisitions librarians have learned to speak the language of contracts and auditing. Coupling this knowledge with the deal breakers from the library's perspective will allow the library to negotiate a contract which meets institutional requirements and goals as well as the goals of the library for service and quality. These qualifications apply most directly to large scale contracts such as outsourcing, approval plans, shelf- ready materials, OCLC services, and document delivery services.

In addition, libraries now purchase more materials than in the past which carry a contract such as each Web version of existing print journals. The number of these licenses and the nuances of each threaten to overwhelm our abilities to review and negotiate them. For example in the past three years, The Ohio State University Libraries (OSUL) has seen the role of its serials librarian evolve so that close to 50% of her time is spent in some form on the review and negotiation of licenses for electronic products. Again, this workload has been manageable without an increase in human resources because other activities have been shifted to high-level paraprofessional staff. In addition, as the volume of activity related to these electronic products has grown, some aspects of the information-gathering process have become more routine as our experience has grown. Today, a large percentage of the information-gathering previously done by the serials librarian has been shifted to staff. The serials librarian becomes involved after all of the information is gathered and reviewed; she negotiates with the institution's attorney and has been described by him as the equivalent of a paralegal in the ways in which she facilitates his final review of the contracts. The serials librarian provides the final negotiation with the supplier based on the information gathered earlier. In contrast, the staff now assigned these responsibilities has become available from two sources: the downsizing and streamlining of the serials exchanges process and the increased efficiency of the serials invoicing process through the use of electronic invoicing. As a result, we have freed staff resources from these two activities to devote to the process of reviewing and negotiating licenses for electronic products.

Library skills, management skills, and business skills already exist in the acquisitions departments of libraries. They are transferrable skills that can migrate with changes in the ways materials are acquired. But what is being done to encourage new librarians to develop these skills? Who will fill this vital role in the next century? In a recent message to ACQNET, a moderated listserv for acquisitions, Adrian Alexander posed the following dilemma:

I noted this morning yet another position announcement on ACQFlash. There seem to be a larger than usual number of positions open right now for serials librarians, including catalogers, and acquisitions librarians. I know that I have been contacted by three different clients this summer alone asking for candidate suggestions. As a vendor and a librarian, I am concerned about this trend. All parties involved in the process, including vendors, benefit from libraries having highly competent people who have, or can develop, good acquisitions skills and truly enjoy the work. But, does this recent spate of job openings signal a growing supply and demand crisis? If so, how do we address it?¹

Another acquisitions librarian came back from the recent ACRL Conference in Nashville with concerns that academic administrators are convinced that there is no longer room in libraries for specialists such as serials or acquisitions librarians. "Let the vendors do it or let the paraprofessionals do it, librarians are too expensive to be wasted on such 'routine'...behind the scenes chores. Librarians should be on the front lines and if they're not, they're dead wood."² Technical services skills are being dismissed as inconsequential and easily supplied by

paraprofessional staff or vendors. With the current trend in staffing patterns in libraries and the mandate to do more with less, it is essential that we expand the role of staff and the partnerships which can be made with vendors to maximize the expertise of technical services librarians. However, the management literature makes it clear that middle managers are essential opinion leaders and innovators in the early adoption of new technologies and innovative approaches to doing business. As a result of numerous studies with Fortune 500 companies, Rosabeth Moss Kanter concludes that middle managers are the vital element in organizational innovation. They are essential to idea generation as well as playing a major role in implementation.³ If we do not continue to develop and enrich the current pool of technical services managers, we will find ourselves without the skills needed to manage the partnerships with vendors and set the guidelines and arbitrate the circumstances outside the guidelines for the staff. We will find ourselves in short supply of technical services managers who can work with institutional officers such as purchasing, legal affairs, and accounts payable to manage the unique aspects of the acquiring process for library materials.

A Message to Acquisition Librarians

The transition is already upon us. Acquisitions librarians are no different from any other specialist in the library world. We find ourselves with one foot firmly planted in the traditional world of acquisitions; no one has stopped purchasing print material. Our other foot is firmly planted in the new world of electronic material. We must find a way to continue to purchase print material successfully while building a bridge to the future world of acquiring virtual items or disposable items. Even as the library world in general sees itself threatened by new players, the acquisitions librarian often feels threatened by the new players within the library who see a role for themselves in the acquisition of electronic products. It is difficult not to become defensive and territorial. Instead, we must believe that our skills are valuable and transferable and act on those beliefs. In another recent post to ACQNET, Jack Montgomery admonishes us about our own role in transforming ourselves for future success;

I still observe a certain blindness within the profession to the fact that we must focus on working smart and cost effectively. By cost effectively, I mean that we must focus on the most expensive element in the workplace, our labor costs. We need to focus our energy on doing our work the best we are able while streamlining the workflow and trimming the excess. ... For catalogers, it may mean allowing others to copy catalog in order to adopt to or bring down labor costs. For acquisitions, it may mean having catalogers do your verification and download your records. One way or another, we must eliminate unnecessary and costly expense in our daily workflow. As an example, in a recent meeting I was told of a library that manually checks the pagination on every book received or periodical bound. I thought to myself that they must have an enormous backlog or an enormous amount of extra time to spend in this manner. This is the kind of work practice that must change. If we expect our administrators to be able to defend our value to the organization, we are going to have to start acting like the businesses we are in actuality as well as making those in decision making positions aware of the services we do provide to the library organization.⁴

We must also be prepared and proactive at reviewing existing guidelines and requirements as they relate to our changing world. Let us look at the example of acquiring electronic products. The partnership between collection development and acquisitions is as essential as ever and likely more intertwined than in the past. In the past we had a clear line between what is collection development responsibility (the decision of what is to be purchased) and acquisition responsibility (the action of acquiring the material once the selection decision is made) particularly as it relates to

the purchase of print material. That line is not so clear when it comes to electronic products. The selection process for electronic products often requires a test of the product. Operating on their negative experiences with suppliers who want to supply print materials "on trial," acquisitions has often refused to allow tests. Thus, in today's environment collection development arranges the test since acquisitions will not. Instead, acquisition should be proactive in recognizing that the selection process for electronic products and the behavior of suppliers of electronic products is different from our previous experience. In this new arena, the request for a test is reasonable and often necessary for making a sound selection decision. As a result, acquisitions should facilitate and arrange the test so that collection development can make the best decision. In the process of arranging the test, acquisitions also has the ability to meet institutional requirements up front rather than correcting any problems that occur later. It is the classic win-win situation for everyone. Collection development gets to test the product as desired. Acquisitions continues its role of managing the acquiring process and develops a new procedure for testing products which meets institutional requirements and provides an avenue for converting the test into a purchase or clearly ending the test and resolving any invoice or return issues.

Acquisitions librarians must also be prepared to move beyond our traditional roles and cultures. Our first and foremost job is to be a librarian. As librarians we must look beyond the requirements of our day to day responsibilities and be concerned about the library as a whole. Decisions made for your department are critical but should never be made in isolation. For example, in 1997 OSUL faced the decision about whether to rebid the approval plan this year (a year before the contract was due to expire) or next year (when the contract did expire). This decision must be reviewed and made with an eye to multiple perspectives. First, how would the rebid of the contract affect the acquisitions department, its staffing and any other concerns? For acquisitions, it would be better to wait an additional year for the rebid of the plan because of the anticipated absence of several important individuals to the process. Second, what is the current satisfaction level with the plan from collection development's perspective? Much dissatisfaction has been expressed by individual collection managers with the current plan. For many, rebidding the plan this year would be preferred. However, in 1997, OSUL was also in the process of merging five branch libraries into a single merged library. This merger absorbed much of the time of at least five key collection managers. Although they, too, were dissatisfied with the current plan, it might be preferable for these collection managers to live with the dissatisfaction for another year because of the demands of the merger. Third, as a part of OhioLINK, OSUL was involved in an OhioLINK approval plan task force which was reviewing the value of a statewide approval contract for a single vendor to improve discounts and facilitate cooperative collection development. Delaying the approval plan rebid would allow OSUL to see the outcome of this task force's work before proceeding with a new bid. Although it is likely that OSUL will have to proceed with its own bid before the OhioLINK issue is resolved, the initial report of the task force will likely inform our decision on the length of time to propose for our next contract.

As part of moving beyond our traditional roles, acquisitions librarians must accept that it does not really matter whether or not an acquisition department by that name continues to exist. Some organizations will opt to continue traditional hierarchies where there is clearly an acquisitions department or a technical services division. Other institutions will choose other models such as support units for particular subjects such as humanities, sciences, and social sciences. Some institutions will opt for team structures; others will choose hierarchies. Expending energy on the anxieties associated with organizational structures and territories is counter productive. Instead, acquisitions librarians must focus on articulating the value of the roles and

skills they provide rather than the exact context in which they provide them. For example, document delivery and interlibrary loan are exciting, growing areas in the library world today, ones consumed with many new opportunities and decision points. Many of the goals and skills of this process are similar to those of acquisitions. Some institutions have chosen to combine these operations to maximize the similarities of the process and the skills of staff. Another option is the reassignment of the acquisitions or serials librarian to this job in order to apply those valuable skills to a new operation. What we must continue to value is the opportunity to make a contribution to the organization, to use the highly developed skills we have, and to work in a challenging and productive environment.

References

1. Adrian Alexander., "Position Announcements," *ACQNET 7* (July 17, 1997).
2. Pam Matthews, "Staffing Crisis," *ACQNET 7* (July 30, 1997).
3. Rosabeth Moss Kanter, *The Change Masters: Innovations for Productivity in the American Corporation* (New York: Simon & Schuster, 1983).
4. Jack G. Montgomery, "ACQNET 7:29 - Reply #1 of 2," *ACQNET 7* (September 7, 1997).